Using West BriefTools 2.3
With Local Documents

BriefTools is a legal research product from West that allows you to instantly view the status of cited cases, statutes, rules, regulations, and administrative decisions; link to the full-text documents on Westlaw®; and monitor the status of citations within your documents. The Local Documents feature in BriefTools retrieves all of your organization's internal documents that contain a particular citation.

BriefTools 2.3, the latest version, installs into the West Solutions Framework, in Microsoft® Word or Corel® WordPerfect. Download the latest version of BriefTools at http://west.thomson.com/software/brieftools/default.aspx.

Getting Started
Open your legal document in Word or WordPerfect and then choose West BriefTools from the West Solutions Select Product drop-down list.

Interactive Citation-Checking Features

INSERTING LINKS
While viewing a document in Word or WordPerfect, click Insert Links on the West BriefTools home page in the left frame or click the Insert Links button on the toolbar. Links are added to the citations in your document. Click a link to display the full-text document on Westlaw.

INSERTING FLAGS AND LINKS
While viewing a document in Word or WordPerfect, click Insert Flags & Links on the West BriefTools home page or click the Insert Flags & Links button on the toolbar. KeyCite® flags and links are added to the citations in your document. Click a KeyCite flag or link to display the KeyCite result or full-text document on Westlaw.

UPDATING FLAGS
Click Update Flags on the West BriefTools home page or click the Update Flags button on the toolbar to see whether the status of the documents cited in your document has changed. If the status of a cited document has changed, its citation will be highlighted in yellow.

HIDING/SHOWING FLAGS AND LINKS
Click Hide/Show Flags & Links on the West BriefTools home page or click the Hide/Show Flags & Links button on the toolbar to toggle between hiding and showing the KeyCite status flags and links in the document.

REMOVING FLAGS AND LINKS
Click Remove Flags & Links on the West BriefTools home page or click the Remove Flags & Links button on the toolbar to delete all KeyCite status flags and links in your document.

For assistance using BriefTools, call 1-800-WESTLAW (1-800-937-8529).
For free reference materials, visit west.thomson.com/westlawguides.
Monitoring Citations with KeyCite Alert

The Monitor/KeyCite Alert feature allows you to monitor the status of documents cited by your document.

1. Open your legal document in Word or WordPerfect.
2. Click Monitor/KeyCite Alert on the West BriefTools home page or click the Monitor/KeyCite Alert button on the toolbar.
   The Monitor Citations with KeyCite window is displayed.
3. Select the check box next to the citation of each document you want to monitor.
   Click Deselect statute check boxes if you do not want to include statutes in your request.
4. Choose KeyCite options from the For cases drop-down list, the For statutes drop-down list, or both drop-down lists.
   Click Limit Citing Refs to limit citing references. The Limit Citing References window is displayed, as shown below. Select your options and click OK.

![Limit Citing References window](image)

Figure 2. Limit Citing References window

5. Leave the delivery settings as they are or change them by clicking Edit. Click Save after you finish making your changes.
6. Complete the entry details.
7. Click Go.

Using Local Documents

The Local Documents feature retrieves all of your firm’s internal documents that contain a particular citation. Documents must first be added to and indexed in Local Search Indexing Administration. Local Search Indexing Administration runs in its own interface and stores document locations for indexing. Click Local Search Indexing Administration on the West BriefTools home page to open it.

To retrieve a document using Local Documents, complete the following steps:

1. Click Local Docs on the West BriefTools home page or click the Local Docs button on the toolbar.
   The Local Documents dialog box is displayed.
   **Note** Click Admin to open Local Search Indexing Administration.
2. Type the citation for which you want to search in the Citation text box and click OK. All documents containing that citation are listed in the Local Documents Display window.
3. Click a document name to open it.

Creating a Report

For information on creating an online report with KeyCite status flags and links to the full-text documents on Westlaw using WestCheck®, see the WestCheck User Manual on west.thomson.com/westlaw/guides.